All properties are reporting on an annual basis. Please contact our office at 406-841-2840 and ask to speak to Bob, Rena, or Todd if you have any questions.

Building Tab
After clicking on proceed to units; select the unit and click on new tenant cert/re-cert tab.

General Tab
1. *Report Period:* The one that has been assigned to you
2. *Name:* First and last of HOH (either way is fine just be consistent)
3. *SSN:* **Last 4 digits only;**
   a. Can use birth month and year if no ssn# is available. (10/15/1968 would be 1068)
   b. If unborn child just put in all zeros until number is assigned.
4. *Birthdate*: For unborn child, put approximate due date. Able to change once child is born
5. *Sex and marital status:* Optional
6. *Employment Type/Occupation:* **Only used to report Student status**. This must be entered for each household member. Choose one of the following:
   a. FT student, Title IV assisted
   b. FT student, Job Training program
   c. FT student, Married/joint return
   d. FT student, Single parent w/dependent
   e. FT student, Previous foster care
   f. Other, Not full time student
7. *Move-In Date:* Move in date
8. *Initial/new cert date:* Move in Date
   a. If the move in date changes, click on view/modify not new as then you will not be able to adjust the move-in date.
   b. If you need to correct other tenant information before the actual move-in use view/modify button and click directly on section that needs correction.
9. *Unit Assistance Type:* If there is subsidy this is where you would list it. If it is RD please choose Other.
10. *Owner's Designation:* **DO NOT CHANGE THIS ONE;** should always read LIHTC.
    a. For new lease ups only this box will say Market Rate and will need to be changed to say LIHTC.
11. *HOH Special Population:* Leave blank unless a household member is claiming disability. (no verification of disability necessary.)

COL instructions updated January 2014

Additional Household data:
1. Phone and email is optional
2. *HOH Ethnicity*: Needs to be completed for each household member. If they do not disclose, please select not available. This information only needs to be collected at move in.
3. *HOH Race*: Needs to be completed for each household member. If they do not disclose, please select chooses not to disclose. This information only needs to be collected at move in.

You do not have to hit update to save the information in order to proceed to the next tab but if you do not and the browser fails for any reason, you will lose your information.

Additional Household Members:

Household Tab
(skip this tab if there are no additional household members)
1. *Household composition:* Click on new and fill in the information as described above. After all information is entered, click update and add additional household members, including unborn children.

Income Tab
1. *Household Income:* Click new
2. *Member name:* Select the household member
3. *Annual income:* Can either put in total amount or can use the calculate button
4. *Verification date:* This will be the date the employer signed the verification. If it is a self-affidavit it will be the date signed by the party.
5. *Relation:* Leave blank
6. *Source of Income*: Select appropriate type
7. *Income Verification Source:* Select appropriate type
    a. If a self-affidavit choose not verified

Any earned income for minors needs to be entered under their name not the parents. (SS benefits are included in this.)

Click update after information is entered and add all other income for additional members.

COL instructions updated January 2014

Assets Tab
1. *Household Assets:* Click new
2. *Member Name:* Select household member
3. *Type of Asset*: Select appropriate type
4. *Asset Verification Source*: Select appropriate type
5. *Verification Date*: Date verification or under 5000 signed
6. *Relation*: Leave blank
7. *Cash Value*: Total cash value of asset
8. *Annual Asset Income*: Income earned on asset

Click update once all data is entered and add all other assets for additional household members.

Unit Rent Tab
1. *Rent Change Date*: Enter move in date
2. *Tenant Paid Rent*: Monthly tenant paid portion of rent (no prorated amounts)
3. *Mandatory Charges*: Any charge that is required by the property inquire with you company if unsure.
4. *Rent Subsidy*: If known at time of move in
   a. If there is a notification of a future Section 8 rent change date, only enter if within the report period. **If falls outside the period DO NOT ENTER**. If the entire or portion of the household were to vacate the unit you will not be able to delete it once it has been posted.
5. *Utility Allowance*: Enter only if utilities are being paid by tenant. This amount must match what is listed on the right hand side of the box.

*Rent subsidy: Please keep in mind that if a tenant is receiving subsidy that the total amount of tenant paid rent may go above the TC max.

*Remember that the tenant paid portion must stay below the TC limit unless they have subsidy.

*If the tenant stops receiving the subsidy, then the rent must be dropped and cannot exceed the TC max.

COL instructions updated January 2014